

# Using the Group Summary Screen

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### **Please note**

This document is intended to support staff who have attended the Mosaic training course relevant to their role. If you have not attended a relevant course, please contact the [Mosaic Children's Training Team](#). Every effort has been made to ensure that screen shots included are current; there may be some minor differences in look and feel within the system. All data-examples included in this document are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.

## Introduction

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The **Group summary** screen displays when you click on the name of the group, either from the **Person summary** screen or your worklist in the Full or Narrow workview. The screen will also display when you close or exit a Group workstep.

The screenshot shows the 'Group Summary - Family' screen. The navigation bar at the top includes 'Home', 'People', 'Organisations', 'Workers', 'Finance', 'Reports', 'Tools', 'Help', and 'Sign out'. The main header displays 'Group Summary - Family - Family Test (3492491)' with a 'No group description' note. Below this are four tabs: 'Summary', 'Professional relationships', 'Case notes', and 'Documents'. The 'Family' section is active, showing a table with columns for ID, Name, Pronouns, Date of birth, Start date, and Actions. The table lists three entries: 'Brother Test' (11 Feb 2021), 'Sibling Test' (11 Nov 2011), and 'Sister Test' (5 May 2015). Below the table is an 'Address' section for 'Sister, Brother & Sibling Test' at '14 Anastasia Close, Gainsborough, DN21 2UR'. To the right is a 'Current work' section with three items: 'SC Social Care Case Supervision', 'SC Child and Family Progress Meeting', and 'SC Child in Need Visit', all assigned to 'Kinga Bardocz'.

The Group summary page has four main tabs – **Summary**, **Professional relationships**, **Case notes** and **Documents**.

## Summary Tab

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The **Summary** tab has sections that list the members of the group, the addresses of the group members and any current work.

The title of the main section on the Group summary screen will either be Family or Carers depending on the **Group Type** that was selected when the group was first created. The **Family/Carers** section lists the members of the group.

The screen displays the following buttons:

-  - **Add to Family**

This allows you to add another person to the group by finding the person and, if necessary, creating a new person record.

## Find person

Searched for: Last name: **test**

ID	Name	Address	Date of birth	Date of death	<input type="checkbox"/>
<a href="#">3549715</a>	<a href="#">Test</a>	<a href="#">No Fixed Abode, No Fixed Abode, XXX XXX</a>			<input type="checkbox"/>
3549751	Brother Test	14 Anastasia Close, Gainsborough, DN21 2UR	11/02/2021		<input type="checkbox"/>
<a href="#">3549757</a>	<a href="#">Mr Bryan Test</a>	<a href="#">160 Hykeham Road, Lincoln, LN6 8AW</a>			<input type="checkbox"/>
<a href="#">3549758</a>	<a href="#">Monica Test</a>	<a href="#">160 Hykeham Road, Lincoln, LN6 8AW</a>	<a href="#">02/02/1949</a>		<input type="checkbox"/>
<a href="#">3549788</a>	<a href="#">Mrs Mother Test</a>	<a href="#">14 Anastasia Close, Gainsborough, DN21 2UR</a>	<a href="#">12/12/1982</a>		<input type="checkbox"/>
<a href="#">3549787</a>	<a href="#">Sibling Test</a>	<a href="#">14 Anastasia Close, Gainsborough, DN21 2UR</a>	<a href="#">11/11/2011</a>		<input type="checkbox"/>
3549746	Sister Test	14 Anastasia Close, Gainsborough, DN21 2UR	05/05/2015		<input type="checkbox"/>

Showing 1 to 7 of 7 entries

First Previous 1 Next Last

Find again

Add new

Add selected

Cancel

You will not be able to add anyone who is already part of the group. The person will appear on the search results, but the tick box next to their name is disabled. Anybody that can be added will appear highlighted in blue as above. To add a single person to the group, click on the hyperlink for their name. To add multiple people to the group, tick the boxes next to the entries displayed.

Click **Add Selected**, which becomes enabled when the tick boxes are used. The screen will refresh and display the new group members. If at this point it is identified that the wrong person has been added, click on the **X** delete icon to remove them.

- [History](#) - **View group member history**


Displays people that are no longer members of the group with the end date recorded for their group membership. Click on it again to hide the historic group members.

- [Genogram](#) - **View the genogram**

Displays the Genogram for the group members.

-  - **Collapse**

Allows you to collapse the section to take up less space on the screen. When

collapsed, the icon changes to an expand icon , which will expand the section if clicked.

- **Name and ID**



Clicking on any of the hyperlinks that display under these headings will display the **Person Summary** screen for the individual selected.

-  - **End membership**

Allows you to remove a person from the group (providing they are not already involved in a piece of work or are included in an unfinished case note). If the person already has open worksteps or unfinished Case Notes outstanding, a warning will appear. If all work has been completed a date field will appear to record the End Date of their group membership.

- **Addresses section**

The **Addresses** section shows a list of the addresses of members of the group. Where several people share the same address, the address is listed once alongside the names of those living there. If the members of the group live at different addresses, all current addresses will display with clear indication of who lives where.

From this Address section, you can also use the  edit icon or  move icon to amend or change the address of group members.

- **Current work section**

The **Current Work** section lists any work that is in progress for this group. It has three toolbar icons:

-  - **Start new work**

When clicked, the **New work** screen displays. This contains a list of the group members so you can choose which of them this item of work is for. After selecting, click on **Next** and a list of Worksteps that you can start for the group members is displayed. Click the name of the relevant Workstep to start it.

-  - **View workflow map**

This displays a workflow map for the group.

-  - **View work history list**

When selected, the **Work history** list will expand.

Group Summary - Family - Family Test (3492491)  
No group description

Summary Professional relationships Case notes Documents

Work history Start work Workflow map Group summary

Work history



Work history shown for this group only

Show 15 entries Search:

ID	Work	Subjects	Start date	End date	Last assigned to	Responsible team	Actions
23762658	<a href="#">SC Child and Family Progress Meeting</a>	Family Test	Incoming		Kinga Bardocz	Mosaic System Support Team	
23762657	<a href="#">SC Social Care Case Supervision</a>	Family Test	Future		Kinga Bardocz	Mosaic System Support Team	
23762656	<a href="#">SC Child in Need Visit</a>	Family Test	Incoming		Kinga Bardocz	Mosaic System Support Team	
23762655	<a href="#">SC Child and Family Assessment</a>	Family Test	01/03/2023	01/03/2023	Kinga Bardocz	Mosaic System Support Team	
23762654	<a href="#">SC Social Care Request</a>	Family Test	01/03/2023	01/03/2023	Kinga Bardocz	Mosaic System Support Team	

Showing 1 to 5 of 5 entries First Previous 1 Next Last

The **Work history** list displays current and historic worksteps that have been added to group members.

-  - **Actions** icon  
Allows you to Start or Resume a workstep.
- Clicking on a hyperlink in the work column displays the step summary for that work item.
-  - **Return to group summary**  
Minimises the Work history list and returns to the original Family/Carers summary view.

## Professional Relationships Tab

The **Professional relationships** tab lists the **workers** and **organisations** associated with members of the group.

Group Summary - Family - Family Test (3492491)   
No group description

Summary Professional relationships Case notes Documents

Show 15 entries Search:

Worker/Organisation	Relationship	Telephone number	Action
Amy Brooke	Designated Teacher		
CS Childrens Social Care Team (East Lindsey, South)	Key Team (Childrens Social Care)		

Brother Test (07/03/2023 - )  
Sibling Test (07/03/2023 - )  
Sister Test (07/03/2023 - )

Kinga Bardocz	Key Worker (Childrens Social Care)		
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Showing 1 to 3 of 3 entries First Previous 1 Next Last Add

- - **Expand icon**

Expands the field to display which members of the group are involved with the worker or organisation. Clicking on the collapse icon collapses the list.

- - **End relationship – all subjects icon**

Allows the worker or organisation relationship to be ended for all group members.

**End relationship - all subjects**

Ending relationship with CS Childrens Social Work Team (Boston)(Key Team (Childrens Social Care)) for all current subjects of the relationship.

End date \*

End reason \*  
-- Please select --

OK Cancel

**Please note:** If individual cases are closing and the relationship needs to remain on other group members, the relationships will need ending from the **Person summary** screens instead.

Pick the end date and select a reason for ending the relationship. Click **OK** to end the relationship.

- **Adding a Professional Relationship**

Click the **Add** button to add a professional relationship of a worker or an organisation for one or more members of the group.

Enter the worker or organisation name, selecting the corresponding tab. The wildcard % can be used when searching to replace any part of the text. This is particularly useful when searching for organisations. Using the **Type** field is optional to select a category. This will narrow the search results further. Once all the search criteria have been input, click **Find**.

**Find party**

Find worker Find organisation

At least one field marked with a # is required

Name # %social%  
ID #  
Street #  
Post code #  
Other reference #  
Sector  
Sub sector  
Type

Find Cancel

From the search results, click on the correct worker or organisation.

Select a **Relationship type** from the list of available options. The **Start date** defaults to today's date, but this can be changed. Select the members of the group who have this relationship and click on **OK**.

The **Family/Carer Details** summary displays with the **Professional relationships** tab open, and the new relationship will be available to view.

## Case Notes Tab

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**Case notes** added from within the **Group summary** screen are automatically copied over to any group members that are selected. The Case notes tab will only display Group case notes. Any Case notes that have been added from within a **Person summary** screen of an individual will not display here.

Status	Title	Type	Contact date	Completed	By worker	With team	Appendices	
	<a href="#">email from school</a>	Email Message	07/03/2023 13:11		Kinga Bardocz acting for Ryan Hallam	CS Childrens Social Care Team (South Holland)	0	<input type="checkbox"/>
	<a href="#">email from Health</a>	Email Message	07/03/2023 12:58	✓	Kinga Bardocz	Mosaic System Support Team	0	<input type="checkbox"/>
	<a href="#">telephone call to parents</a>	Telephone Call	23/02/2023 15:13	✓	Kinga Bardocz	Mosaic System Support Team	0	<input type="checkbox"/>

The Case notes can be sorted by clicking on the headings **Title**, **Type**, **Contact date**, **Completed**, **By worker** or **With team**.

The screen displays the following icons.

- - **Finished Case Note**

When this icon displays under the Completed heading the Case note has been Finished.

- - **Edit Case Note**

Displays when the Case note is unfinished and still within the 24 hour window for editing. This icon is only active for the author of the Case note.

- - **Timed out**

Displays when the Case note has been left unfinished for 24 hours to indicate that it has been locked. The Case note can still be updated by clicking on the append case note icon to record the new information.

- - **Append Case Note**

Displays when a Case note has been finished and allows the original information to be added to. When this is selected, the Case note will open with an additional text field to record into.

Clicking on the hyperlink for the title will open the individual Case note to display its



contents.

The group members this has been recorded against will display at the top of the Case note. The **Up** and **Down** buttons can be used to scroll through other Case notes in the list. Click on **OK** to exit the Case note.

Multiple or individual Case notes can be printed by ticking the boxes against the Case notes within the list.

Status	Title	Type	Contact date	Completed	By worker	With team	Appendices	<input type="checkbox"/>	
	<a href="#">email from school</a>	Email Message	07/03/2023 13:11		Kinga Bardocz acting for Ryan Hallam	CS Childrens Social Care Team (South Holland)	0	<input type="checkbox"/>	
	<a href="#">email from Health</a>	Email Message	07/03/2023 12:58	✓	Kinga Bardocz	Mosaic System Support Team	0	<input checked="" type="checkbox"/>	
	<a href="#">telephone call to parents</a>	Telephone Call	23/02/2023 15:13	✓	Kinga Bardocz	Mosaic System Support Team	0	<input checked="" type="checkbox"/>	

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

View Add

Once Case notes have been selected, click on the **View** button. The screen will refresh to display all the Case notes with a **Print** button at the bottom of the screen. Once the Case notes have been printed, click **OK** to return to the Case notes tab.

New Case notes can be added by selecting **Add**. The **Add case note** screen displays and defaults to the **Subjects** tab.

Select any group members from the list that is displayed that need the Case note added to their record. Consider whether the information is relevant to all members and whether or not copying the information across will cause a data breach. Do not automatically copy the Case note to all group members.

Once the group members have been ticked, navigate to the **Case note** tab.

The screen displays the following icons.

-  - Save

Allows the Case note to be saved in an unfinished format at any time, once all the mandatory fields have been filled in. The Case note can still be edited for the next 24 hours, after which it will be timed out and locked.

-  - **Finish**

Selecting this will Finish the Case note and save a read only copy to the record of all the group members that have been selected.

-  - **Close**

Closes the Case note screen and can be selected after the Case note has been saved, or if the Case note is no longer required.

- **Add Alert Recipients for this Case note?**

Allows a worker or multiple workers to be searched for and added to the Case note as Alert recipients. Once the Case note has been Finished, an Alert will be sent to notify the worker that there is information recorded that they need to be aware of.

Select **Add recipient** and complete a search for the worker you wish to send the Alert to. Select the worker by clicking on their name. The screen will refresh to display the workers details.

Further workers can be added by selecting Add recipient to include them in the list. If a worker has been added in error, click on the **X** delete icon to delete them. The Alert will be sent once the Case note has been finished.

## Documents tab

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The Documents section contains documents associated with the person. These include:

- Letters and forms that are part of finished worksteps
- Any related documents that have been uploaded, such as specialist reports, referrals or assessments
- Documents that contain information that has been migrated from ICS

**Please note:** documents that have been migrated over from ICS will be in the form of PDFs and each document will contain summary of information.

Home People Organisations Workers Help Sign out

Group Summary - Family - Family Test (3492491)  
No group description

Documents shown for this group only

Show 15 entries Search:

Document	Category	Sub-category	Type	Subjects	Date	Step status	Actions	Download
<a href="#">CS Child and Family Assessment C1256</a>	CS Social Care	Social Care Assessments	FORM		01/03/2023 10:30:31	Completed		<input type="checkbox"/>
<a href="#">SC Childrens Social Care Request C0125</a>	CS Social Care	Requests and Closures	FORM		01/03/2023 10:21:07	Completed		<input type="checkbox"/>

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Show more people Download selected forms and letters Create

Any Documents completed within worksteps will display in the **Forms and letters** tab. Any Documents uploaded into the Document store or attached to worksteps will display within the **Attachments** tab.

To view a document, click on its name and a read-only version will open in a new window. If the document is one that has been uploaded and appears in the **Attachments** tab, you will be prompted to download a copy. Clicking on the step summary icon will open the **Workstep summary** for within which the document was completed. This will allow you to view all documents associated with this step.

The **viewing** buttons allow you to:

- **Show more people** – Expands the list of documents to include those of the person's relatives.
- **Download all forms and letters**– Allows you to download all the documents as a zip file. Forms and letters are included in the zip as PDF's. You are then prompted to save the file and close the prompt window when saving is complete.
- **Create** – Allows you to create any forms or letters that are available outside of a workflow after selecting the group members that need to be the subject of the form or letter.

You are able to upload any documents relating to a person's record, such as a signed copy of a plan, copies of work created with a child, or a copy of an e-mail into

the Documents or to a Workstep.

To upload a document into the Documents, click **Upload** from within the **Attachments** tab. The **Add document** screen will display.

Once you have selected the members of the group who need to be a subject of the upload, click **Next**.

The fields marked with \* are required

**Document file**

File\* Choose File No file chosen

**Filing details**

File as\*

Main Category\* -- Please select --

Sub-category -- Please select --

<< Previous Next >>

Upload Upload and close Cancel

- **File** - Click **Choose file** to locate the document on your computer file system.
- **File as** – the file name will default in and will need renaming to follow the naming convention of *(Service prefix (i.e CS, SC, EH), Doc name, completed by [ints] on [date in reverse order])*

**Please note:** if you change the name of the file, you must keep the file extension at the end, e.g. you must keep the extension *.doc*. If you don't keep the file extension at the end of the file name it can make the file unstable, affecting anyone trying to download it in the future.

- **Main Category** - Select a filing category that reflects the service area for which you are uploading the document.
- **Sub-Category** – Select a category that reflects what the document relates to.
- Click on **Upload and Close**, the document will then display in the Attachments tab.